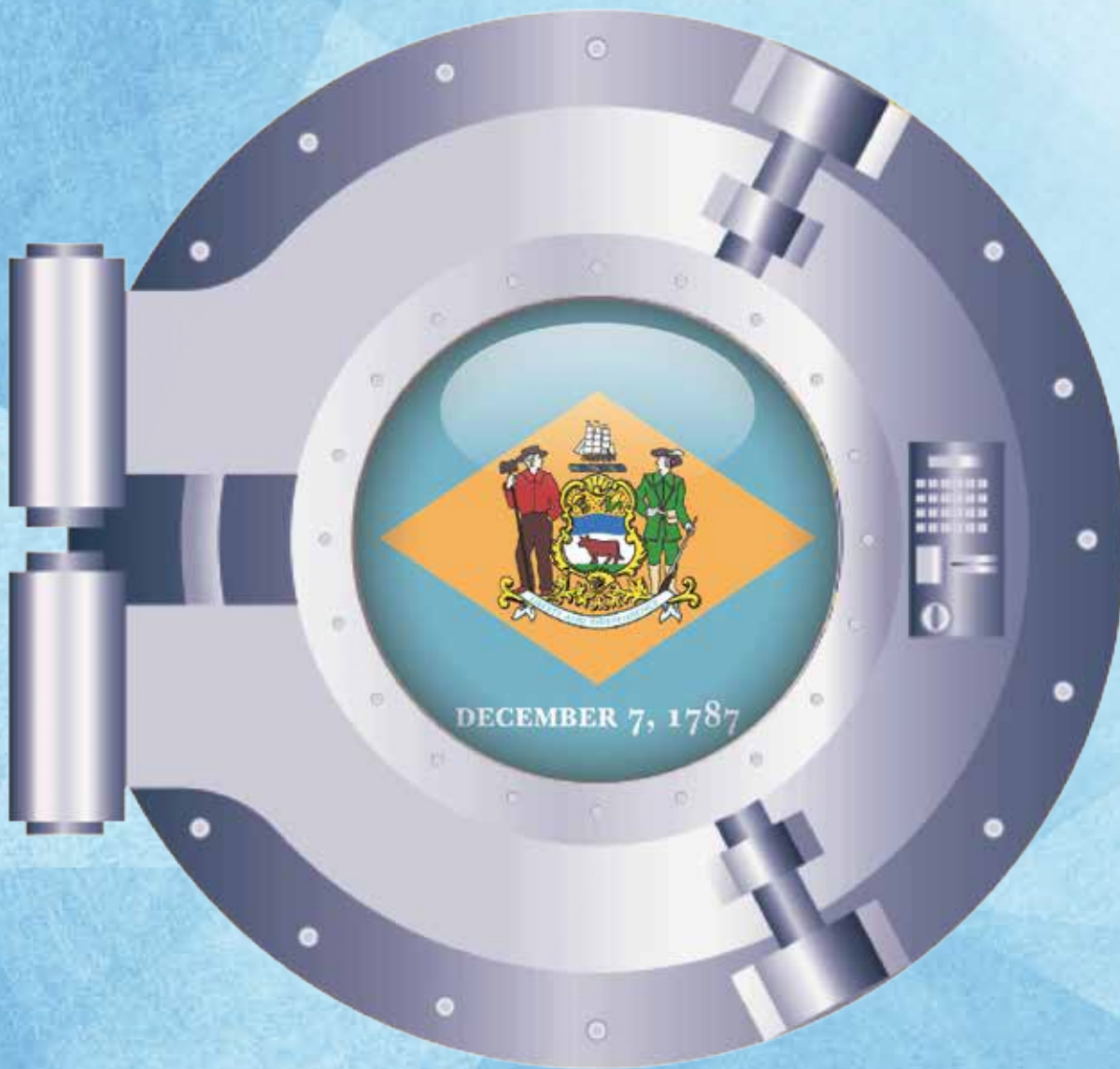


The Delaware Bankers Association &
The Delaware Financial Education Alliance present

2024 Delaware Trust Conference



October 28 & 29

Chase Center on the Riverfront & Live Stream

Program and Agenda



2024 Delaware Trust Conference

Welcome to the 2024 Delaware Trust Conference! This year, the Delaware Trust Conference celebrates its nineteenth year as one of the premiere wealth management events in the country. Over the years, the Delaware Trust Conference has built a reputation for presenting the top names in trust management to highlight the unique advantages of Delaware trusts and how wealth practitioners can best implement those products for their clients. We're confident this year's line-up of presenters will further enhance that record!

As in the past, this year's conference provides a flexible conference experience. In addition to in-person attendance at the spacious Chase Center on the Riverfront, attendees will again have the option of remote viewing via a broadcast-quality live stream. Four on-demand sessions will also be available. All sessions will be available on-demand for up to 18.5 continuing education credits through November 30th.

The following pages detail the agenda, along with information on all our sponsors and exhibitors who make the Delaware Trust Conference possible. We hope you enjoy the 2024 Delaware Trust Conference!



Sarah A. Long
President
Delaware Bankers Association
Delaware Financial Education Alliance



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David A. Diamond, President of The Northern Trust Company of Delaware
Elizabeth M. Luk, Head of Delaware Trust, BNY Wealth, BNY Mellon Trust of Delaware

Day 1 - Monday - October 28th

Note: All Sessions Are Available for Live Streaming.
On-Demand Sessions will be available through November 30, 2024 for Full Credits!

7:45 - 8:30 a.m. - Registration

8:30 - 9:30 a.m. - Plenary Session 1 (60 minutes) - Group Live

Trust Act 24 & More - A review of two exciting new trust statutes passed with Trust Act 24, other statutory changes, as well as pertinent trust case law.



- ♦ Jocelyn Borowsky, Esq., Partner, Duane Morris LLP;
- ♦ Gregory J. Weinig, Esq., Partner, Connolly Gallagher LLP

9:30 - 9:45 a.m. - Welcome / Break - Governor's Hall with Exhibitors

9:45 - 10:45 a.m. - Plenary Session 2 (60 minutes) - Group Live

Deep Dive into the Corporate Transparency Act & Its Impact on Corporate Trustees: The Corporate



Transparency Act (CTA), which went into effect on January 1, 2024, requires certain business entities to report identifying information to FinCEN, including that of any beneficial owners – those who either hold at least at 25% ownership interest or who exercise substantial control over the reporting company. With compliance well under way and the issuance of new Frequently Asked Questions by FinCEN, there is wealth of

practical experience from applying and interpreting the CTA and related guidance. This session will help you better understand how to apply the CTA, including determining whether an entity is a reporting company and who to report as beneficial owners when corporate trustees are involved. The session will also address specific real world case studies involving CTA reporting.

- ♦ Beth King, Principal, Brown Brothers Harriman Trust Company of Delaware, N.A.
- ♦ Glenn Fox, Partner and Co-Leader NY Wealth Management Group, Baker McKenzie
- ♦ Molly E. Bailey, Managing Director, Regional Fiduciary Advisor, Office of Chief Fiduciary, Bank of America Private Bank.

10:45 - 11:00 - Break - Governor's Hall with Exhibitors

11:00 a.m. - 12:30 p.m. - Plenary Session 3 (90 minutes) - Group Live

Review of the Past Year's Significant, Curious, or Downright Fascinating Fiduciary Cases -



This session will review selected reported fiduciary litigation decisions from 2023 that relate to multiple areas of estate planning, estate and trust administration, the fiduciary duties of agents, administrators, trustees, and other fiduciaries, and related trial practice, and identify and discuss navigating contemporary fiduciary challenges.

- ♦ Dana G. Fitzsimons, Jr., Managing Director, Senior Fiduciary Counsel, Bessemer Trust

12:30 p.m. - 1:30 p.m. - Lunch - Riverfront Ballroom

1:30 - 3:00 p.m. - Plenary Session 4 (90 minutes) - Group Live

Delaware, the Center of the Universe (Or Is It?)- *Delaware's trust laws, wealth management industry, and judicial system have placed Delaware in the center of the trust universe, but clients may feel a gravitational pull from competing jurisdictions in Delaware's orbit. In this session we will explore elements impacting the atmosphere of Delaware and competing jurisdictions, including: Laws providing flexibility to draft and modify governing instruments; Laws affecting the management of fiduciary risk; State judicial systems, and much more.*



- ♦ Wendy Zimmer Cox, J.D., CTFA, Senior Vice-President CFO, Director of Personal Trust, Greenleaf Trust
- ♦ Zach Haupt, Special Counsel, Morris, Nichols, Arsht & Tunnell LLP
- ♦ William Kelleher, Director, Gordon Fournaris & Mammarella, P.A.
- ♦ Suzanne Shier, Of Counsel, Levenfeld Pearlstein, LLC

3:00 - 3:15 p.m. - Break - Governor's Hall with Exhibitors

3:15 - 4:15 p.m. - Plenary Session 5 (60 minutes) - Group Live - Ethics

Back-End SLAT's, Estate Taxes and Asset Protection: The Perfect 2025 Planning Technique or Planning Frought with Terror? - *As 2026 quickly approaches, spousal lifetime access trusts (SLATs) will again come to the forefront. Can the Settlor retain an interest in a SLAT? How do the ethics of asset protection play a role in such planning? What about the potential estate tax consequences of so-called "Back-End SLATs?" This presentation will explore all of the above and other topics of interest in SLAT planning.*



- ♦ George Karibjanian, Member, Franklin Karibjanian & Law, PLLC

4:15 - 4:30 p.m. - Break - Governor's Hall with Exhibitors

4:30 - 5:30 p.m. - Plenary Session 6 (60 minutes) - Group Live

Planning with Hard to Value Assets in 2025: Lessons from 2012- December 31, 2025 is quickly approaching signaling the sunset of the current estate tax limits. As trusted advisors, how are we communicating the importance of early planning on funding trusts with hard to value assets? Time is of the essence when considering all the necessary advisors in the planning phase: when does a Trustee cut-off the planning? Is the appraisal company able to conduct a full & complete appraisal of the operating company to meet the deadline for late planners? Is utilizing a Wandry funding formula a hail Mary pass, even with it being a red flag for IRS audit? We will ask these questions and other questions, plus look back at lessons learned from 2012.



- ♦ Isabel R. Araújo, MBA, CTFA, AEP®, Senior Manager, Trust Services Consulting, Charles Schwab Trust Company of Delaware
- ♦ Theresa L. Hughes, CTFA, AEP®, Professional Individual Trustee
- ♦ Mark Lingerfield, Managing Director, MPI

5:30 - 6:30 p.m. - Reception - Governor's Hall with Exhibitors

Day 2 - Tuesday - October 29th

7:15 - 8:00 a.m. - Registration

8:00 a.m. - 9:30 a.m. - Plenary Session 1 (90 minutes) - Group Live -



FEDERAL TAX UPDATE - Stay up to date with this informative and entertaining recap of important cases, rulings, regulations, and legislation from the past 12 months in the federal income, estate, and gift tax laws.

- ♦ Samuel A. Donaldson, Professor of Law, Georgia State University

9:30 - 9:45 a.m. - Break - Governor's Hall with Exhibitors

9:45 a.m. - 10:45 a.m. - Plenary Session 2 (60 minutes) - Group Live -

Protection, Perch, or Pillory - How Drafters and Trustees Can Support the Well-Being of the Next



Generation - This panel discussion will discuss new § 3345 and provide an overview of an empirically-backed framework for defining well-being, the uses and benefits of the new Beneficiary Well-Being Trust Statute, how traditional planning tools may impact beneficiary well-being, and how to incorporate new tools into traditional trust planning.

- ♦ Todd A. Flubacher, Partner, Morris, Nichols, Arsht & Tunnell LLP
- ♦ Kristin Keffeler, MSM, MAPP, Chief Learning Officer, Johnson Financial Group
- ♦ Ronald Templeton, Jr., Senior Trust Officer, Team Lead, The Bryn Mawr Trust Company of Delaware

10:45 - 11:00 a.m. - Break - Governor's Hall with Exhibitors

11:00 - 12:00 p.m. - Plenary Session 3 (60 minutes) - Group Live

Coast to Coast: Trends in State Income Taxation - Using a case-study approach, this inter-disciplinary



panel of professionals will demonstrate the power of collaboration to maximize opportunities for mitigating state income taxes for individuals and their trusts, coast to coast.

- ♦ Jane G. Ditelberg, Director of Tax Planning, The Northern Trust Company
- ♦ Karly A. Laughlin, CPA, AEP, Tax & Small Business Director at Belfint, Lyons & Shuman
- ♦ Joy Elizabeth Matak, JD, LLM, Partner, Avelino Law, LLP

12:00 p.m. - 1:00 p.m. - Lunch - Riverfront Ballroom

1:00 - 2:00 p.m. - Plenary Session 4 (60 minutes) - Group Live - Ethics

Our Fiduciary Duty to Protect Elders from Financial Abuse - Financial professionals and trustees have an ethical duty to protect our clients from harm. Learn the various ways criminals are exploiting seniors and the role we have in helping prevent this abuse.



- ♦ Jeremy Lau, CFA, CFP® - CEO, Prudent Investors
- ♦ Jared Ong, CFP® - Principal, Prudent Investors

2:00 - 2:15 p.m. - Break - Governor's Hall with Exhibitors

2:15 - 3:15 p.m. - Plenary Session 5 (60 minutes) - Group Live

Conflict of Laws: What Makes the Delaware Advantage Work? What Endangers Its Future? - Existing conflict-of-laws rules make it possible for nonresidents to create Delaware dynasty, directed, and asset-protection trusts. This session will explore the underlying legal principles and cover the ongoing drafting of the Uniform Conflict of Laws in Trusts and Estates Act and the Restatement (Third) of Conflict of Laws, which might—or might not—put those conflict-of-laws rules at risk.



- ♦ Robert H. Sitkoff, Austin Wakeman Scott Professor of Law, John L. Gray Professor of Law, Harvard Law School
- ♦ Richard W. Nenno, Senior Counsel, Young Conaway Stargatt & Taylor, LLP

3:15 - 3:30 p.m. - Break - Governor's Hall with Exhibitors

3:30 - 4:30 p.m. - Plenary Session 6 (60 minutes) - Group Live

So, Here's What's Going On: A Trustee's Fiduciary Duty to Report - This session discusses a Delaware trustee's fundamental fiduciary duty to report to the trust beneficiaries and related issues, including reporting in connection with operating entities held in trust and the intersection of the trustee's obligations with Delaware's virtual representation, designated representative, and silent trust statutes. The discussion includes practical takeaways, such as what steps a trustee can take to satisfy its duty and protect itself, and real-world examples.

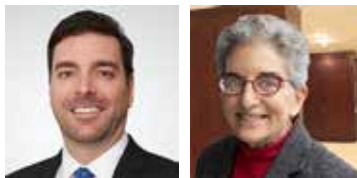


- ♦ Vincent C. Thomas, Partner and Co-Chair, Business Planning and Tax Section Young Conaway Stargatt & Taylor, LLP
- ♦ Aileen C. Denne-Bolton, Managing Director and Fiduciary Counsel, Office of the General Counsel, Brown Brothers Harriman & Co.

4:30 - 4:45 p.m. - Break - Governor's Hall with Exhibitors

4:45 - 5:45 p.m. - Plenary Session 7 - (60 minutes) - Group Live

Don't Get Carried Away with the CCA - CCA 202352018, released at the end of 2023, addresses the question of whether adding a tax reimbursement clause to a grantor trust will constitute a taxable gift by the beneficiaries who consented to the trust modification. This session will discuss why the government issues CCAs, the impact of this CCA, the role of beneficiary consents, alternatives to avoid gifts, the relative advantages and disadvantages of different types of trust modifications, and more.



- ♦ Daniel R. Stanek, Associate Fiduciary Counsel, Bessemer Trust Company of Delaware
- ♦ Beth Shapiro Kaufman, Partner, National Chair, Private Client Services, Lowenstein Sandler LLP

On Demand Sessions

On Demand Session 1 - Understanding GST and Planning Opportunities – Beware and Be Aware! *This session will demystify the complexity of GSTT and build to planning opportunities, which is especially important given the looming sunset of the 2017 tax act.*



- ◆ Erin Markham, AEP®, CTFA, TEP, Vice President, Senior Trust Officer, The Goldman Sachs Trust Company
- ◆ Mark Parthemer, Chief Wealth Strategist & Florida Regional Director, Glenmede

On Demand Session 2 - Creditors, Predators and Modern Asset Protection Planning - Asset protection planning *is a common estate planning and asset management goal to help clients account for creditors and predators. The program will cover the pros and cons of various modern asset protection tools, appropriate circumstances under which to deploy these tools, and how creditors may attack them to satisfy their claims.*



- ◆ Jeffrey C. Wolken, National Director, Delaware Trust Planning at Wilmington Trust, N.A.
- ◆ Raymond Radigan, Senior Managing Director/Wealth Advisor Peapack Private
- ◆ Beth Gansen Knight, Director, Richards, Layton & Finger, P.A.
- ◆ Daniel S. Rubin, J.D., LL.M. (Taxation), Farrell Fritz, P.C., New York, New York

On Demand Session 3 - Life Finds a Way: Estate Planning in the Age of Assisted Reproductive Technology - Explore the impact of assisted reproductive technology (ART) on estate planning, including stored reproductive material as client property, inheritance rights of children born of donated genetic material, posthumously-conceived children, and changing definitions of descendants.



- ◆ Trisha Hall, Partner, Connolly Gallagher LLP
- ◆ Alex Lyden, Chief Fiduciary Officer and Trust Counsel at Evercore Trust Company, N.A.
- ◆ Sarah Moore Johnson, Birchstone Moore LLC

On Demand Session 4 - Special Considerations for the International Client - International clients looking to establish US situs trusts pose unique challenges for estate planning counsel as well as for the US fiduciary of any resulting trusts. In this session, we will discuss these challenges from both the planning and administrative perspective.



- ◆ Daniel Hayward, Partner, Gordon, Fournaris & Mammarella, P.A.
 - ◆ Bobbi Lynn Kent, Chief Fiduciary Officer & Chief Administrative Officer
The Northern Trust Company of Delaware
-



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The Bryn Mawr Trust Company of Delaware serves as a Delaware corporate fiduciary and administrative trustee under the full spectrum of tax advantaged Delaware solutions contemplated by attorneys and advisors throughout the United States. We support all of Delaware's laws and statutes addressing personal trusts and estate planning, business and institutional trusts, holding companies, captive domicile entities, and alternative business entities.

Robert W. Eaddy

President

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The Glenmede Trust Company of Delaware (GTCDE) is a privately owned and independent trust company that provides specialized fiduciary, investment, wealth planning and family office services for clients seeking access to Delaware's flexible trust laws and highly respected Court of Chancery. GTCDE serves as a trusted adviser to individuals and families as well as charitable entities that seek a trust company operating solely in Delaware to meet a variety of charitable, tax and estate planning goals. Working collaboratively yet distinctly from its affiliate, The Glenmede Trust Company, N.A. (GTCNA), our integrated wealth team helps our client base bring their purpose and vision to life.

David Zakielarz

President, The Glenmede Trust Company of Delaware | Managing Director

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Gordon, Fournaris & Mammarella, P.A. is a law firm located in Wilmington, Delaware focusing on Trusts and Estate Planning, Fiduciary Litigation, Business Planning and Transactions, Commercial Real Estate, Land Use, Zoning, Corporate and Commercial Litigation and Taxation.

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Young Conaway Stargatt & Taylor, LLP provides counseling to high net-worth individuals concerning their estate planning and assists with a myriad of sophisticated wealth planning transactions. The firm also advises individual and corporate fiduciaries concerning the proper administration of estates and trusts, and counsels them concerning the relocation of trusts to Delaware, mergers, decantings, and other modifications. Our firm's attorneys file estates and trust actions in the Delaware Court of Chancery, including, trust consent petitions, petitions for instructions, will contests, and other complex litigation matters, involving estates and trusts.

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Delaware Trust Company

BMO Delaware Trust Company is a wholly-owned subsidiary of BMO Financial Group (“BMO”) and part of BMO Wealth Management, which includes a broad offering of wealth management products and services with an active presence in markets across Canada, the United States, Europe and Asia.

As part of this offering, BMO Delaware provides customized Delaware Trustee services for individuals choosing to integrate Delaware planning solutions into their overall wealth plan. Our expertise in Delaware affords us a deep knowledge of the nuances and complexities of Delaware trust law. BMO’s combined capabilities and expertise enables us to help manage the increasing complexity that comes as our clients plan, grow, protect, and transition their wealth.

Contact:

Anne Booth Brockett

President | Chief Trust Officer

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Charles Schwab Trust Company of Delaware (CSTCD) provides administrative trustee services exclusively for Registered Investment Advisors, private family offices, and their clients. Acting solely as a directed trustee under Delaware law, CSTCD's structure allows independent advisors to develop and maintain long-term investment relationships for trust assets while leveraging industry-leading securities custody, technology, and administrative expertise for the families they serve.

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Morris Nichols is nationally known for the strength of its Trusts & Estates/Private Client practice.

We have a market leading practice advising banks and trust companies in the highly specialized area of Delaware trust law. Chambers High Net Worth (HNW) has ranked our practice in Band 1 among Delaware law firms for private wealth law and private wealth disputes, with sources touting the group's reputation as "one of the leading firms in Delaware," and the "first point of reference" on Delaware trust law.

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For more than 130 years, Northern Trust has provided the highest level of wealth management services to clients through 56 locations nationally and around the world. In fact, we've been named Best Private Bank by the Financial Times Group eleven times in the last thirteen years.

The Northern Trust Company of Delaware, a subsidiary of Northern Trust Corporation, has established a team of experts in Wilmington with the goal of leveraging one of the most tax-advantaged jurisdictions in the United States for the benefit of our clients. We specialize in delivering insightful perspectives and creative thinking to grow, manage and preserve multi-generational wealth for individuals and their families.

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For more than two centuries, BNY Wealth has provided services to financially successful individuals and families, their family offices and business enterprises, planned giving programs, and endowments and foundations. It has \$308 billion in total client assets, as of July 12, 2024, and an extensive network of offices in the U.S. and internationally. We deliver leading wealth advice across investments, banking, custody, and wealth and estate planning. With a dedicated team of wealth managers and fiduciary specialists in Greenville, BNY Mellon Trust of Delaware provides full corporate trustee and trust administration services that complement the wealth planning needs of individuals and families. For more information, visit bnymellonwealth.com.

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CHILTON --- TRUST

Chilton Trust, a private, independent Trust Company, provides wealth management services including fiduciary services and investment solutions to high net worth individuals, families, and foundations. Chilton Trust operates under a national charter, and in addition to its principal office in Palm Beach, FL, includes Chilton Trust Company of Delaware, based in Wilmington, and trust representative offices in Charlotte, NC, Naples, FL, New York, NY and Stamford, CT.

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Gina M. Nelson, Senior Vice President – Head of Fiduciary Services

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Daniel Cihanowyz, CTFE, Senior Trust Officer

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For more information, please contact:

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S&P Global Market Intelligence

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2024 DELAWARE TRUST CONFERENCE

Program Details

LEARNING OBJECTIVES: To further the understanding of the unique aspects of Delaware Trusts for the benefit of trust professionals to assure that their trust clients receive the most timely, knowledgeable and beneficial advice to maximize their trust needs.

AT COMPLETION OF THIS CONFERENCE, YOU WILL BE ABLE TO: Define the steps an international client uses when considering establishment of a Delaware trust and apply the same to the development of their business; Apply best practices methods on satisfying client needs and trust administration; Identify and apply current trends in Delaware trust planning to better serve existing clients and broaden your trust knowledge, including consideration of both state and national trends; Identify and avoid potential risks to trust clients and trust companies with regard to potential litigation, particularly in the fields of document drafting and review, fiduciary oversight, trust transfer and ethics; analyze and identify potential issues with special assets, asset protection trusts, and international filing requirements for trusts.

PROGRAM CONTENT: Delaware trusts are solid, dependable, and best of all thanks to Delaware's rule of perpetuity, they're built to last! The seventeenth annual Delaware Trust Conference will highlight all the unique advantages of the First State's trust environment. Attendees will enjoy a stellar line-up of the nation's top trust, legal and wealth management experts, all of whom will provide them with the latest information on using Delaware trusts to the maximum benefits for themselves and their clients.

PROGRAM LEVEL: Intermediate

PROGRAM PREREQUISITES & ADVANCE PREPARATION: Those attending the conference will be from varied backgrounds; however all should have a minimum of a bachelor's degree from an accredited college or university. In addition, the attendees will also have a variety of higher educational degrees and designations including, but not limited to J.D., CPA, CTFA, and CFP.

DELIVERY METHOD: Group Live discussions with PowerPoint supplements. All materials presented are provided to attendees in digital electronic format.

REGISTRATION INSTRUCTIONS: Both days for \$1,395 for DBA/FEA members; \$1,795 for non-members. Daily prices are also available and are listed on the enclosed application. To register, please complete the registration form on-line: <https://portal.debankers.com/events/>

Questions? Call 302-678-8600 or email Renee Rau: renee.rau@debankers.com

REFUND POLICY: If an attendee drops a seminar after the registration deadline, but at least ten (10) business days before the conference starts, the drop fee is \$100.00. After October 18, 2024, the attendee will be charged the full cost of the conference. If the attendee does not drop the conference and does not attend, s/he will be considered a “no-show” and will be charged the full cost. Qualified substitutions are permitted at any time. Continuing education credits will be given to the individual who attends the conference.

PROGRAM CANCELLATION POLICY: The DBA/FEA reserves the right to cancel a session for insufficient enrollment. If a class is cancelled, the DBA/FEA will notify the registrants at least five (5) business days before the scheduled date and refund the course fee.

COMPLAINT RESOLUTION POLICY: Every program’s relevance is guaranteed. If an attendee becomes dissatisfied with the program, she/he will receive a full refund of the enrollment fee or be permitted to attend an equivalent program at no charge. For more information regarding administrative policies such as complaints and refunds, please contact our offices at 302-674-0202.

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**Total Credits for
2024 Delaware Trust Conference = 18.5 CLE
applied for (DE & PA) (including 2.0 Ethics Credits),
CPE & ICB Credits Applied for.
Participants can earn up to 18.5 CPE credits in
Specialized Knowledge and Applications
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